



# ***Trends, Statistics and Economic Importance of Heritage Tourism***

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# U.S. Department Of Commerce

## International Trade Administration Tourism Resources

### OFFICE OF TRAVEL & TOURISM INDUSTRIES

**U.S. Commercial Service**  
*151 Offices in 83 Countries*

**U.S. Commercial Service**  
*105 U.S. Offices*



# Office of Travel & Tourism Industries





# Agencies of the Tourism Policy Council



Department of Agriculture

Department of Commerce  
(EDA/USFCS/NOAA)

Department of Homeland Security

Department of Housing &  
Urban Development

Department of Interior

Department of Labor

Department of State

Department of Transportation

Executive Office of the President

Office of the Vice President

Office of Management and Budget

Small Business Administration U.S.

Army Corps of Engineers

Additionally Invited:

*President's Committee on the Arts and  
the Humanities*

*Environmental Protection Agency*

*Department of Health and Human  
Services*

*Advisory Council on Historic  
Preservation*



# U.S. Commercial Service



***The U.S. Commercial Service is part of the U.S. Department of Commerce, an agency of the United States government.***

## **Our mission:**

- ▶▶ To promote the export of goods & services from the United States, particularly by small- and medium-sized businesses
- ▶▶ To represent U.S. business interests internationally
- ▶▶ To help U.S. businesses find qualified international partners



# Our Network & What it can do for you



- Trade specialists in over 100 U.S. cities and 83 countries worldwide...



## We can...

- Locate international buyers, distributors & agents
- Provide expert help at every stage of the export process
- Help you to enter new markets faster and more profitably



# Heritage and Cultural Tourism

- Our nation's cultural heritage and natural assets play a significant role in attracting international visitors.
- The Native American Culture; Heritage Music; Arts and Crafts and Jewelry are a tremendous draw for international travelers.



# Heritage and Cultural Tourism

- An extraordinary opportunity to expand the travel experience by incorporating the arts, music, culture and special character of a place.
- Cultural and heritage organizations such as museums, performing arts organizations, festivals, etc., have formed partnerships with tour operators, state travel offices, convention and visitor bureaus, hotels, air carriers, etc., to create cultural tour packages





# Principles for Heritage/Cultural Tourism

- Collaborate
- Find a fit between the community and tourism
- Make sites and programs come alive
- Focus on authenticity and quality
- Preserve and protect your resources



# The Heritage/Cultural Traveler

- Are generally better educated, more affluent and have higher expectations for travel experiences that are both enjoyable and educational.
- Spend more: \$623 per trip vs. \$457 for other travelers.
- Travel longer: 5.2 nights as opposed to 3.4 nights for other travelers.



# The Heritage/Cultural Traveler

- For some travelers, cultural and heritage experiences are “value added”, enhancing their enjoyment of a place.
- For a growing number of travelers who are tired of the homogenization of places around the world, authentic experiences are an important factor and motivator for their travel decisions and expectations.



# Travel Trends to the U.S.

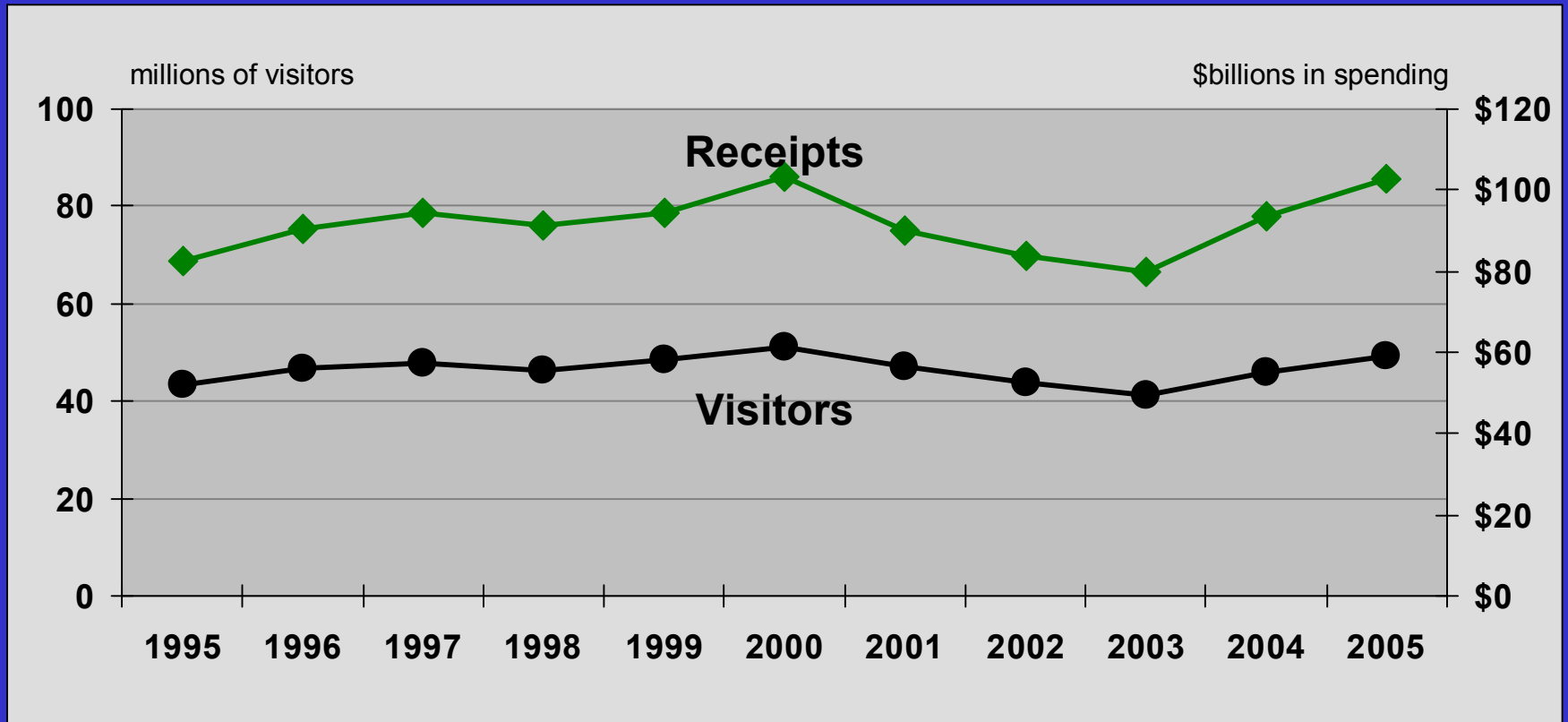




# U.S. Arrivals & Receipts

## 1995-2005p

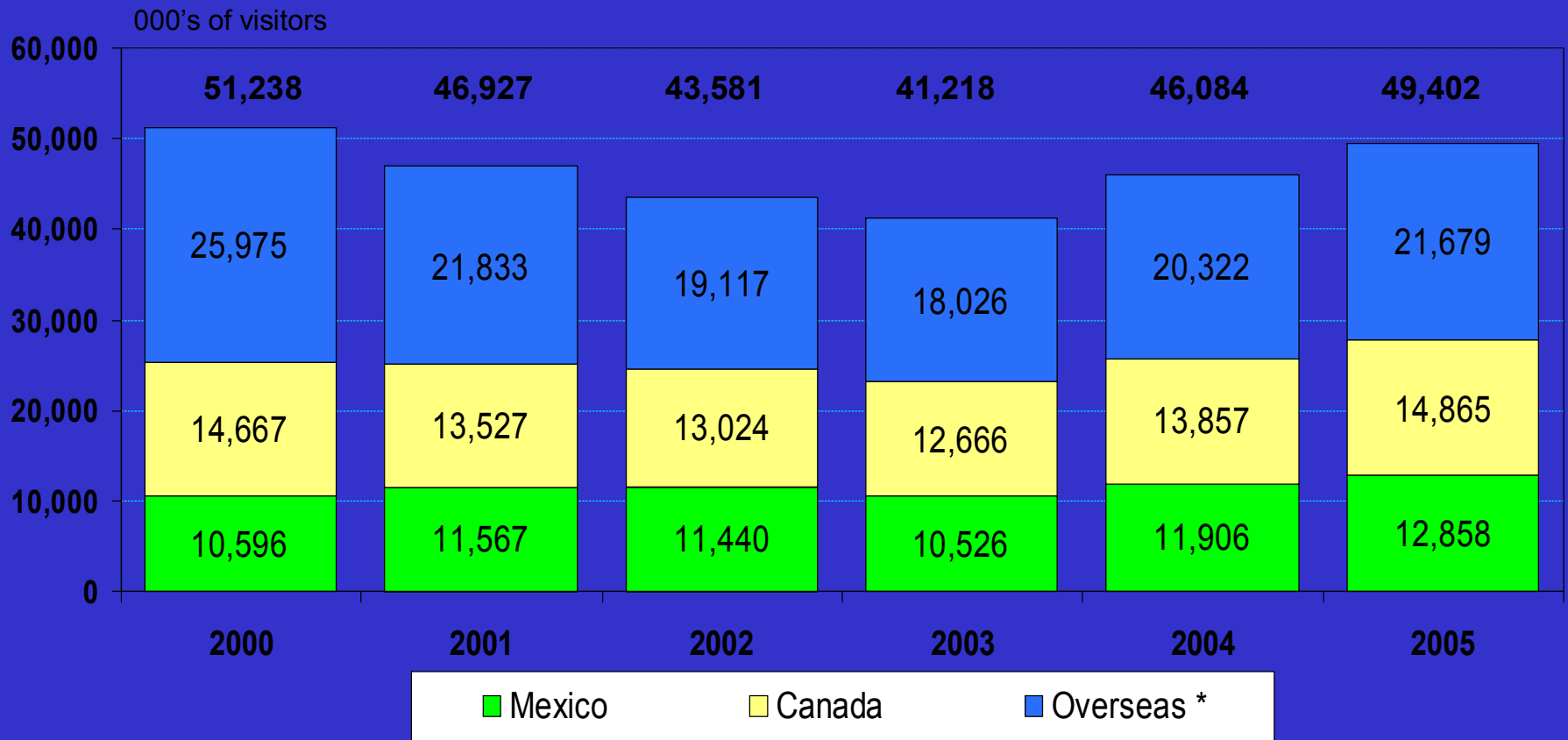
Visitor spending (receipts) closely mirrors visitor volume. Receipts were \$102.6 billion in 2005, while visitor volume was 49.3 million. Both measures nearly broke 2000 records.



Sources: Department of Commerce, Office of Tourism Industries; Department of Commerce, Bureau of Economic Analysis; Statistics Canada; Banco de Mexico.



# International Travelers to the U.S. (2000-2005)



Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Banco de Mexico/ Secretaria de Turismo (Mexico); Statistics Canada

Note: All arrivals are for one or more nights

\* Overseas includes all countries except Canada and Mexico



# International Travelers to the U.S. (2005)

Origin of Visitor	2005 (000s)	05 / 04 % change
<b>International Total</b>	<b>49,402</b>	<b>7%</b>
Canada	14,865	7%
Mexico	12,858	8%
<b>Overseas</b>	<b>21,679</b>	<b>7%</b>
United Kingdom	4,345	1%
Japan	3,884	4%
Germany	1,416	7%
France	879	13%
Korea	705	13%

Sources: U.S. Dept. of Commerce, ITA, Office of Travel & Tourism Industries; Statistics Canada; Secretaria de Turismo (Mexico)



# International Travelers to the U.S.

(2006 through June year-to-date)

Origin of Visitor	2006 YTD (000s)	06 / 05 % change
Canada	7,422	6%
Mexico *	2,402	29%
<b>Overseas</b>	<b>9,976</b>	<b>-1%</b>
United Kingdom	1,953	-5%
Japan	1,768	-4%
Germany	641	-3%
France	343	-16%
Korea	357	5%

Sources: U.S. Dept. of Commerce, ITA, Office of Travel & Tourism Industries; Statistics Canada; Secretaria de Turismo (Mexico)





# Top Ten Travel Export Markets

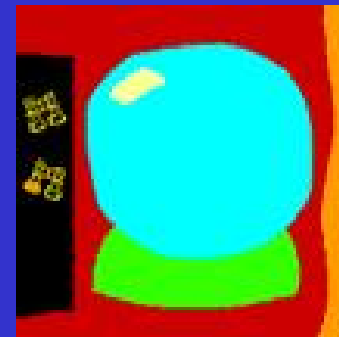
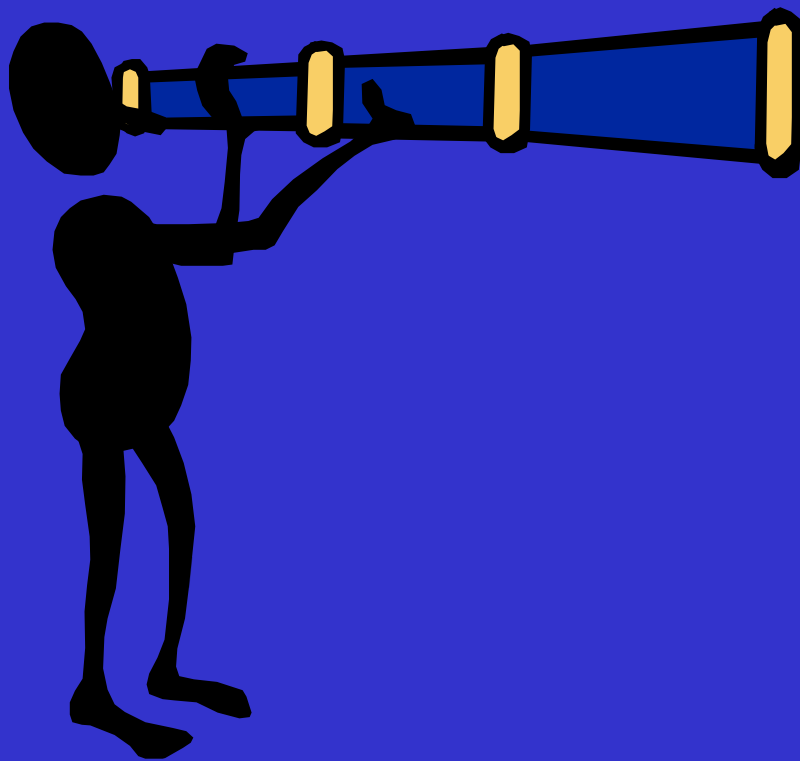
(2005 & record receipts/year)

Origin Country	Total Travel Receipts 2005r (\$mil)	Record Travel Receipts (\$mil)	Year Record Set
Japan	\$16,520	\$17,803	1995
United Kingdom	\$13,464	\$13,464	2005
Canada	\$11,586	\$11,586	2005
Mexico	\$8,500	\$8,500	2005
Germany	\$4,886	\$6,117	1996
France	\$3,098	\$3,654	2000
Australia	\$2,803	\$2,554	2005
Korea	\$2,608	\$2,653	1996
Brazil	\$2,201	\$3,862	1997
Italy	\$2,201	\$2,558	1998
<b>U.S. TOTAL</b>	<b>\$102,611</b>	<b>\$103,087</b>	<b>2000</b>

r = The spending figures have been revised from the preliminary estimates released in April 2006.

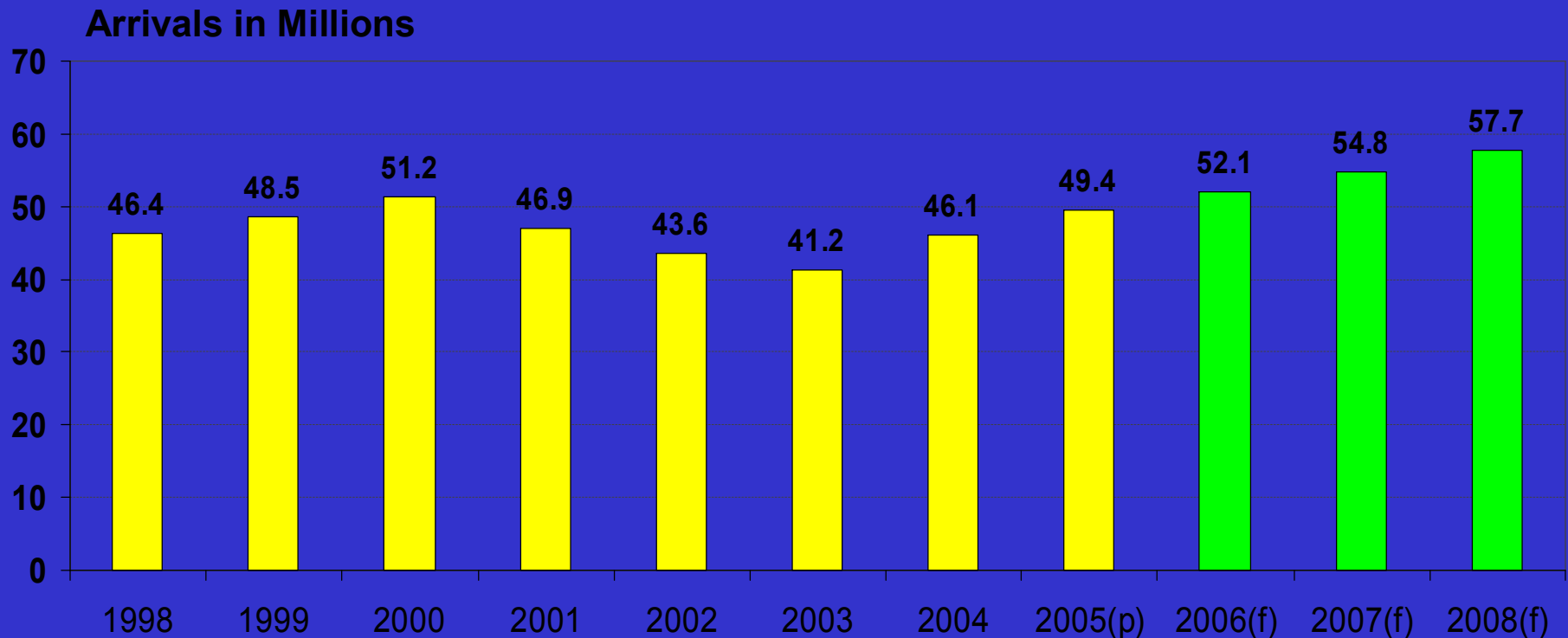


# Forecasts for International Travel and Trends to Watch





# International Visitors to the U.S. And Projections (1998-2008f)



**Sources:** U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; Secretaria de Turismo (Mexico); Statistics Canada

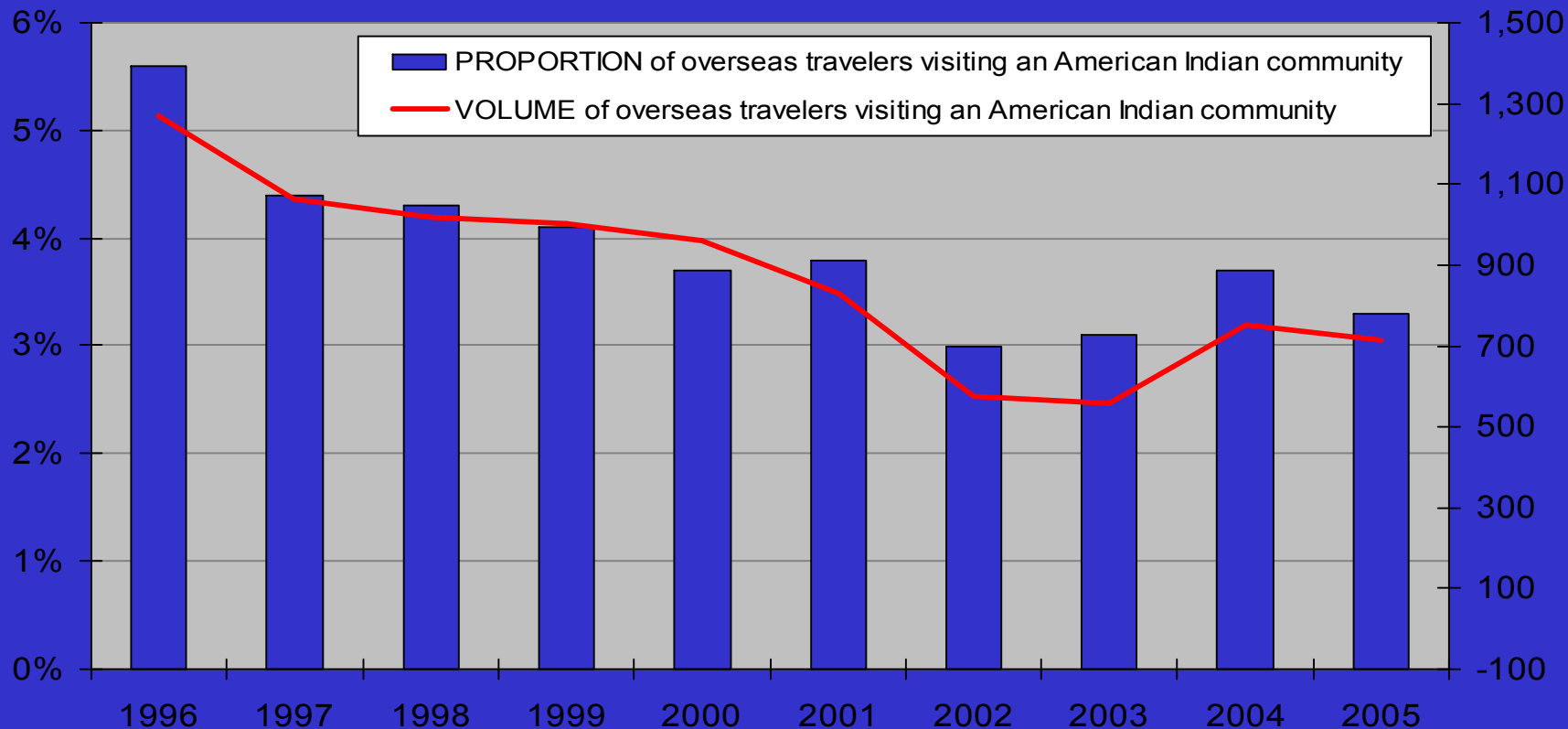
p = preliminary, subject to revision

f = forecast; one or more nights (Issued September 2006)



# Trends in Visiting American Indian Communities (1996-2005)

The proportion of all overseas visitors who visited an American Indian community has declined over the past decade and more than offset increases in overseas visitors up until 2000. Since then, volume declines in VAIC reflects a combination of decline in proportion and declines in overseas visitors.





# Country Origin Markets

## Visiting American Indian Communities: Visitors (000s)

The decline in visitors to American Indian communities has been caused mostly by the German market--31% of the total decline of 553,000 visitors. All of this large markets had actual volume declines over this 10-year period.

Origin Country	1996	2000	2004	2005	Visitor Decline 05 / 96	% of Visitor Decline
<b>Overseas</b>	<b>1,269</b>	<b>961</b>	<b>752</b>	<b>715</b>	<b>-553</b>	<b>- - -</b>
Germany	256	132	90	82	-173	31%
Japan	83	66	30	27	-56	10%
France	110	79	43	68	-42	8%
Sweden	50	9	9	19	-31	6%
Taiwan	33	19	7	6	-27	5%
Switzerland	29	20	4	5	-25	4%
Italy	41	52	39	29	-13	2%
Venezuela	14	19	3	3	-11	2%
South Korea	25	15	14	16	-9	2%
U.K.	179	188	189	169	-9	2%



# Country Origin Markets

## Total Visitors to the U.S. (000s)

The declines often reflect declines in total visitation...

Origin Country	1996	2000	2004	2005	Visitor Decline 05 / 96
Overseas	22,658	25,975	20,322	21,679	-979
Germany	1,997	1,786	1,320	1,416	-581
Japan	5,183	5,061	3,748	3,884	-1,299
France	987	1,087	775	879	-108
Sweden	269	322	254	291	22
Taiwan	415	457	298	319	-96
Switzerland	417	395	243	257	-160
Italy	525	612	471	546	21
Venezuela	447	577	330	340	-107
S. Korea	749	662	627	705	-44
U.K.	3,246	4,703	4,302	4,345	1,099



# Country Origin Markets

## Visiting American Indian Communities: % (000s)

...but more often reflect the decline in participation rate of visiting American Indian communities.

Origin Country	1996	2000	2004	2005	% Change 05 / 96
Overseas	5.6%	3.7%	3.7%	3.3%	-41%
Germany	12.8%	7.4%	6.8%	5.8%	-55%
Japan	1.6%	1.3%	0.8%	0.7%	-56%
France	11.1%	7.3%	5.6%	7.7%	-31%
Sweden	18.5%	2.7%	3.6%	6.4%	-65%
Taiwan	7.9%	4.2%	2.2%	1.9%	-76%
Switzerland	7.0%	5.0%	1.8%	1.8%	-74%
Italy	7.9%	8.5%	8.3%	5.3%	-33%
Venezuela	3.2%	3.3%	0.9%	0.9%	-72%
S. Korea	3.4%	2.3%	2.3%	2.3%	-32%
U.K.	5.5%	4.0%	4.4%	3.9%	-29%



# Overseas Visitor Characteristics

Visitors to American Indian Communities are active travelers, stay for a long period of time, and spend above average amounts of money.

	All Overseas	Vacation Travelers	Visit Am. Indian Communities
Advance Trip Decision (Avg. # of Days)	80	99	129
First International U.S. Trip	22%	27%	34%
Purpose of Trip: Vacation	62%	100%	81%
Nights Spent in the U.S. (mean / median)	16 / 8	14 / 8	31 / 17
Number of States Visited	1.5	1.5	2.7
Number of Destinations Visited	1.9	2.1	4.0
Ave. Expend. In U.S./Visitor	\$1,594	\$1,456	\$1,774





# Activity Participation Rates

Activity Cross-Participation Rates Among Travelers Visiting American Indian Communities (VAIC) (2004 vs. 2005)

Activities	2005 Overseas (%)	2005 Vacation (%)	2004 VAIC (%)	2005 VAIC (%)
Shopping	89	93	86	94
Dining in Restaurants	84	86	87	89
Sightseeing in Cities	42	51	61	66
Visit Historical Places	35	40	72	72
Amusement/Theme Parks	28	35	42	44
Visit Small Towns	27	31	66	71
Water Sports/Sunbathing	22	30	29	30
Touring Countryside	21	25	60	65
Art Gallery/Museum	20	23	41	37
Cultural Heritage Sites	19	23	57	53
Visit National Parks	18	22	67	73
Guided Tours	17	23	35	31
Concert/Play/Musical	15	17	21	24

Note: Multiple choice responses allowed for activities. Activity participation is not destination specific.



# Activity Participation Rates

Activity Cross-Participation Rates Among Travelers Visiting American Indian Communities (VAIC) (2004 vs. 2005)

Activities	2005 Overseas (%)	2005 Vacation (%)	2004 VAIC (%)	2005 VAIC (%)
Nightclubs/Dancing	13	13	22	17
Casinos/Gambling	10	12	35	35
Cruises	7	10	10	10
Golfing/Tennis	7	7	6	7
Attend Sports Event	6	7	10	13
Ethnic Heritage Sites	5	5	29	29
Camping/Hiking	4	4	17	19
Visit Am. Indian Comm.	3.3	4.1	100	100
Environ./Eco. Excursions	3	4	14	15
Hunting/Fishing	2	2	3	5
Snow Skiing	2	2	1	5
Ranch Vacations	1	2	4	6

Note: Multiple choice responses allowed for activities. Activity participation is not destination specific.



# U.S. Commercial Service Products & Services for the Tourism Industry

- Travel and Tourism Trade Shows
- Market Research
- Gold Key Service
- Trade Counseling & Advocacy
- International Partner Search
- Single Company Promotions
- FAM Tours





# Recent U.S. Commercial Service Travel Market Reports

- Travel Trends: Japan
- Native American Tourism Packages Available on the German Market
- German Market for Native American Travel to the U.S.
- German Market for Native American Products
- Travel Media in the United Kingdom



# International Travel Shows

- ITB Berlin
- World's largest travel trade show
- 67,000 trade visitors
- 63,000 consumer visitors
- Over 400 U.S. exhibitors at 200 booths
- Next ITB: March 2007



# International Travel Shows

- WTM London
- World's largest travel trade only show
- 40,000 trade visitors
- 5,000 exhibitors
- 400 U.S. exhibitors at 40 booths
- Next WTM: November 2007



# U.S. Commercial Service Programs for American Indian Communities

- First DOC Associate Office on an Indian Reservation – San Manuel
- Created An Associate Office with the Tlingit-Haida Central Council in Alaska which serves 20 villages
- Video conference with Italian buyer and artisans at RES '99 in Phoenix
- Actively involved in organizing and supporting the annual American Indian Tourism Conference



# U.S. Commercial Service Programs for American Indian Communities

- Special export workshops series for Indian communities held in Alaska, Arizona, New Mexico, South Dakota, Utah and other states.
- Native American Tourism Featured at Trade Event in 6 locations in Australia
- 7 American Indian Tourism Organizations featured at BIT 2003, Travel and Tourism Show in Milan, Italy
- American Indian jewelry featured at CHIBI Jewelry Show, Milan, Italy





# U.S. Commercial Service Programs for American Indian Communities

- Native Americans represented at the Hong Kong International Jewelry Show, March 2004
- Special Native American Section at ITB Berlin in March 2004– See Native America, One Tribe At A Time
- Special Native American Cultural Program at the John F. Kennedy School in Berlin, March 2004
- Native American representation at ITB 2005, including cultural program.
- Series of International Tourism Marketing Workshops on Native Land in April 2005
- Six Native American tribes represented at a Nordic Travel Program in January 2006



# Websites

Office of Travel and Tourism Industries

<http://tinet.ita.doc.gov>

Travel and Tourism E-Market Express

<http://www.buyusa.gov/eme/tra.html>



# How to contact the U.S. Commercial Service

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